555-7101-212

CallPilot

Installation and Configuration

Part 4: Client Software Installation Guide

Product release 1.07 Standard 1.0 May 2000

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P0905797

CallPilot

Installation and Configuration

Part 4: Client Software Installation Guide

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Contents

1 Getting ready 9

Installation flowchart 10
Overview. 11
What the software adds to the administrative PC 12
The installation programs 13
Before you begin the installation 14

2 Installing or upgrading the CallPilot client on the administrative PC 17

Overview. 18
Installing the client on the administrative PC. 19
Upgrading the client on the administrative PC. 26
Installing and uninstalling PEP packages 33

3 Starting the client and adding a system 39

Overview. 40
About the CallPilot Administration Client Explorer 41
Starting the CallPilot Administration Client Explorer 43
Adding a system 44
Opening a system to access the administration tools 47
Grouping systems into a site. 49

4 Testing your channels 51

Overview. 52
Testing call channels and multimedia channels 53

5 Setting up CallPilot after the installation 61

After you install CallPilot. 62

6 Uninstalling CallPilot client software 65

Overview. 66
Uninstalling the client software 67

7 Reinstalling CallPilot client software 71

Overview. 72

Reinstalling the client software. 73

Index 77

Chapter 1

Getting ready

In this chapter

Installation flowchart 10

Overview 11

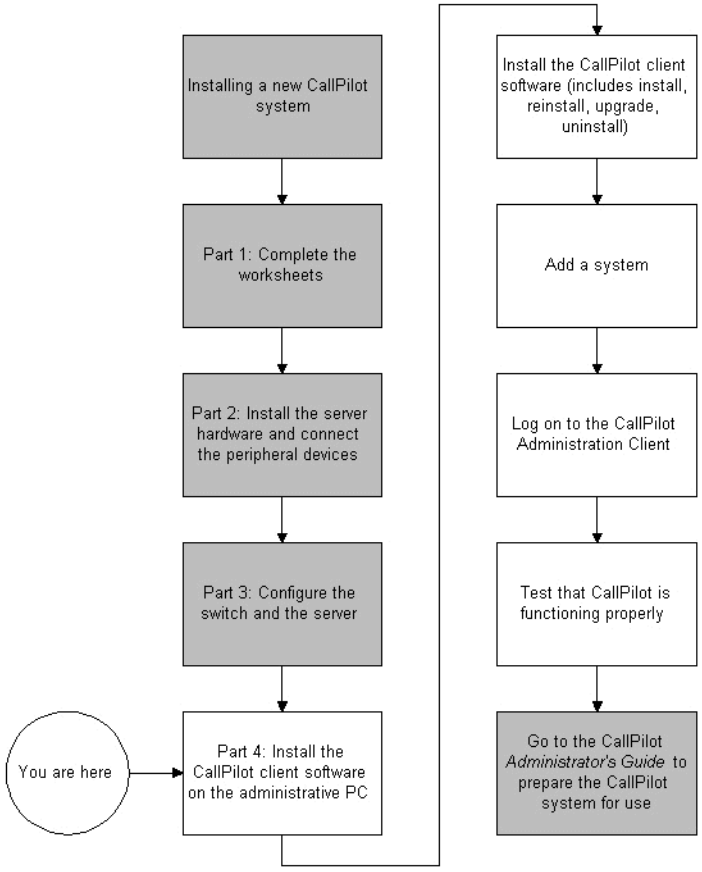
What the software adds to the administrative PC 12

The installation programs 13

Before you begin the installation 14

Installation flowchart

The following flowchart shows the steps to complete in Part 4: Installing the CallPilot Client software.


Installing a new CallPilot system
Part 1: Complete the worksheets
Part 2: Install the server hardware and connect the peripheral devices
Part 3: Configure the switch and the server
You are here
Part 4: Install the CallPilot client software on the administrative PC
Install the CallPilot client software (includes install, reinstall, upgrade, uninstall)
Add a system
Log on to the CallPilot Administration Client
Test that CallPilot is functioning properly
Go to the CallPilot *Administrator's Guide* to prepare the CallPilot system for use

Overview

Introduction

The CallPilot client software is installed on the administrative PC. The administrative PC is used to maintain the CallPilot server and client software and to work with your CallPilot systems.

This document provides the following procedures:

- the install, upgrade, uninstall, and reinstall of the CallPilot client software on an administrative PC
- instructions on how to add a CallPilot system and group your systems into sites
- a test for your call channels and multimedia channels after the client software installation is complete

What the software adds to the administrative PC

Introduction

You install the CallPilot client software on an administrative PC so that you can connect to the server and administer the CallPilot system. You can use this version of the CallPilot client to administer all earlier versions of the CallPilot server.

What you add during installation

The following table summarizes what you add to the administrative PC when you install the CallPilot client software:

Software	What is added
CallPilot client	■ CallPilot administrative services ■ upgrade of Microsoft ODBC drivers to version 3.51 ■ SQL Anywhere drivers ■ Application Builder ■ Nortel Reporter ■ Reporter templates for CallPilot ■ updated fax printer drivers ■ Acrobat Reader ■ online documentation PDF guides ■ CallPilot tour ■ Application Builder tour

The installation programs

Introduction

Setup is the installation program that sets up the administrative PC.

You run the same setup program to install, upgrade, uninstall, and reinstall the CallPilot client software.

Setup program steps

The setup program steps are shown on the left side of the client installation window during the installation. The setup program goes through the following processes:

- configuring the installation
- installing or upgrading ODBC and SQL Anywhere drivers
- copying files for each component to the hard drive
- setting the registry
- configuring the database
- configuring the CallPilot Administration Client
- removing obsolete components
- installing the Nortel Fax Printer driver
- creating a program shortcut on the system drive for the CallPilot client called the Nortel Networks CallPilot Administration Client

Before you begin the installation

Introduction

Before you install the software on the administrative PC, check that the following items are available.

What you need

You need the CallPilot Client CD-ROM before starting the installation.

Hardware requirements for the administrative PC

The following hardware must be in place to ensure effective use of the CallPilot software:

- Intel Pentium 90 MHz (or faster) PC
- 32 Mbytes of RAM
- a hard disk drive with 130 Mbytes of free space available for the CallPilot software only

  This does not include space requirements for Reporter. Additional disk space is required for Reporter databases and storage of data.
- a CD-ROM drive
- dial-up networking, or one Ethernet Network Interface Card or one Token Ring Network Interface Card. The Embedded LAN requires an Ethernet Network Interface Card; the Customer LAN can use either card.
- a parallel printer port
- 16-color VGA 800x600 (256-color SVGA 800x600 is highly recommended)
- a sound card and microphone for recording custom prompts (optional)
- a Windows-compatible mouse

Software requirements

The administrative PC requires one of the following operating systems and additional software:

- Windows 95A
- Windows 95A with Service Pack 1
- Windows 95B OEM Service Release 2
- Windows 95C
- Windows NT Workstation 4.0, Service Pack 3 or higher
- Windows 98
- TCP/IP
- Optional: Remote Access Service (RAS) on Windows NT or Dial-Up Networking on Windows 95/98

Time required

Installation of the CallPilot client software takes approximately ten minutes depending on the speed of the PC. The Table of Contents on the left side of the installation window highlights each step in the installation process as it occurs.

Chapter 2

Installing or upgrading the CallPilot client on the administrative PC

In this chapter

Overview 18

Installing the client on the administrative PC 19

Upgrading the client on the administrative PC 26

Installing and uninstalling PEP packages 33

Overview

Introduction

This chapter describes how to install or upgrade the CallPilot client software, and how to install any required Performance Enhancement Packages (PEPs).

If you are installing CallPilot for the first time, the CallPilot installation main menu highlights the installation procedure. If you already have a version of CallPilot installed on your system, CallPilot dims the installation option and highlights the other available options on the main menu.

Installing the client on the administrative PC

Introduction

To install the CallPilot client software on the administrative PC, run the setup program on the CallPilot Client CD or from a network drive.

Checklist for the installation of client software

Step	✔
Check that hardware requirements are met. See “Hardware requirements for the administrative PC” on page 14.	
Check that software requirements are met. See “Software requirements” on page 15.	
Obtain the user ID and password required to log on to the administrative PC. On a Windows NT administrative PC, you need an account that has local administrative privileges.	
Check the “Before you begin” section. See “Before you begin” on page 20.	
Start the client software installation. See “To install the CallPilot client” on page 22.	
Install client PEPs, if necessary. See “Installing and uninstalling PEP packages,” on page 33.	

Note: You no longer require the Client Checking Tool that was used in the previous release of CallPilot. The software incompatibilities are now resolved in the installation software.

Before you begin

Log on

Ensure that you are logged on to an account with local administrative privileges (for example, Administrator).

Check that TCP/IP is installed

If TCP/IP is not installed, a warning message appears before the installation begins. Install TCP/IP on your operating system.

Check that Dial-Up Networking or RAS is installed

If you are using a modem, check that Dial-up Networking or RAS is installed.

- Dial-Up Networking (DUN)

  DUN is required if the administrative PC is running Windows 95/98 and is going to connect to the server over a modem connection.

  If Dial-Up Networking is not installed, a warning dialog box appears during the installation and asks if you want to quit the installation. Click No to bypass this prompt. Then install Dial-Up Networking later, if necessary.

  Dial-Up Networking might be installed as part of the Windows operating system installation. If Dial-Up Networking does not appear in the My Computer folder, then it is not installed. For information on how to install DUN, refer to the administrative PC's Windows operating system documentation.

- Remote Access Service (RAS)

  RAS is required if the administrative PC is running Windows NT and is going to connect to a remote server.

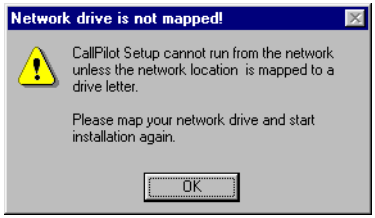
ODBC drivers

During the installation and upgrade programs, CallPilot might upgrade your ODBC drivers. Make sure that all programs that use ODBC drivers are shut down before you begin the installation or upgrade program.

If you install from a network CD-ROM drive

If you are installing from a remote CD-ROM or a network share, map the CallPilot Client CD to a drive letter on the administrative PC.

If the Client CD is not mapped to a drive letter, the following dialog box appears:


Network drive is not mapped!
CallPilot Setup cannot run from the network unless the network location is mapped to a drive letter.
Please map your network drive and start installation again.
OK

Shut down of Nortel Reporter

CallPilot shuts down Nortel Reporter before the installation begins. The installation software displays a message when this occurs.

Acrobat Reader 3.0 installation

After the CallPilot client installation is finished, CallPilot automatically starts the installation of Acrobat Reader 3.0 from the CallPilot Client CD. Follow the steps in the Acrobat Reader installation procedure to complete the installation.

Note: If you do not install Acrobat Reader, you cannot view the online reference guides.

Acrobat Reader search plug-in

Acrobat Reader 3.0 includes a search plug-in. The search plug-in enables you to search for keywords across the suite of online reference guides. If you install Acrobat Reader from the CallPilot Client CD, you get the search plug-in.

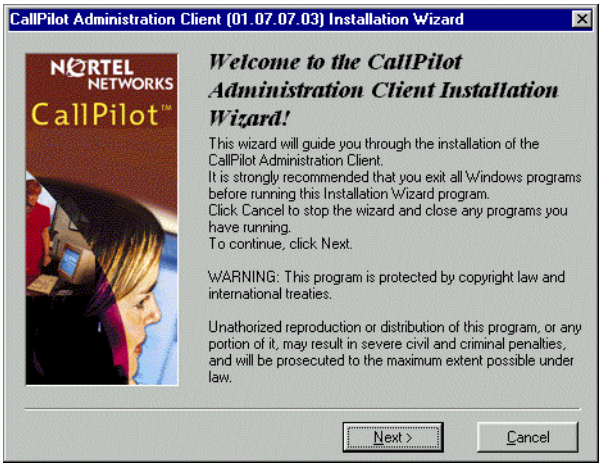
If you have Acrobat Reader 3.0 or higher already installed on the administrative PC and you do not replace it with the version on the CallPilot Client CD, make sure you have the search plug-in installed. Use the Find File tool on Windows Explorer to see if you have the search plug-in (Asrch32.api) installed.

To install the CallPilot client

1. Exit all applications and close all windows.
2. Insert the CallPilot Client CD. If you are installing from a remote CD-ROM or a network share, map the CallPilot Client CD to a drive letter on the administrative PC.

   Note: If the system cannot read the CD-ROM, make sure the CD is properly seated in the drive. If you must remove the CD during the installation process, when you put the CD back in the drive, CallPilot continues the installation at the point it left off. However, Windows NT begins a second installation at the same time. Cancel the second installation process and continue with the first installation.

   Result: The setup program starts and the Welcome window appears.

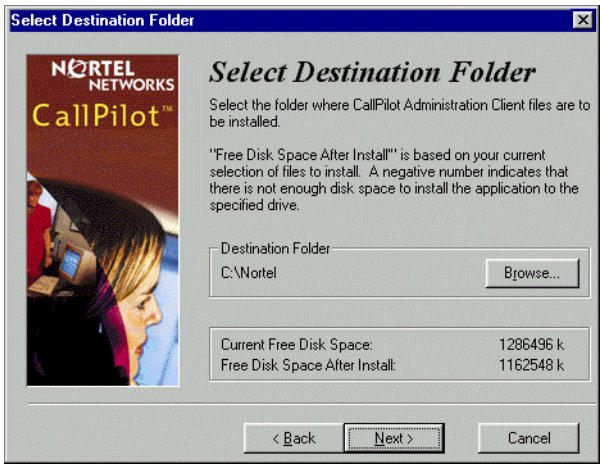

CallPilot Administration Client (01.07.07.03) Installation Wizard
NORTEL NETWORKS
CallPilot™
Welcome to the CallPilot Administration Client Installation Wizard!
This wizard will guide you through the installation of the CallPilot Administration Client.
It is strongly recommended that you exit all Windows programs before running this Installation Wizard program.
Click Cancel to stop the wizard and close any programs you have running.
To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Next >
Cancel

3 Click Next to continue the installation.

Result: The Main Menu appears.

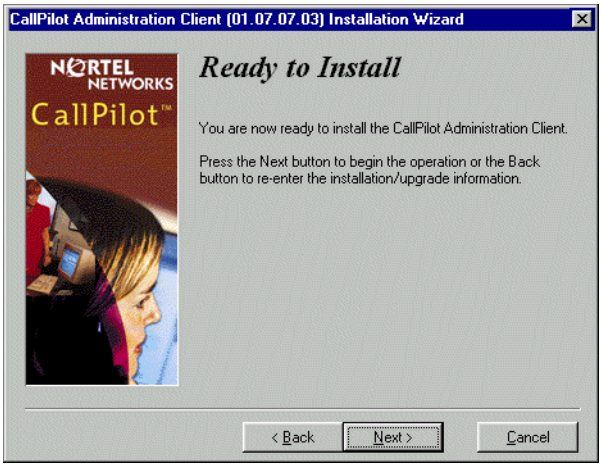
4 Click Install to start the installation.

Result: The Select Destination Folder appears.


Select Destination Folder
NORTEL NETWORKS
CallPilot™
Select Destination Folder
Select the folder where CallPilot Administration Client files are to be installed.
"Free Disk Space After Install"' is based on your current selection of files to install. A negative number indicates that there is not enough disk space to install the application to the specified drive.
Destination Folder
C:\Nortel
Browse...
Current Free Disk Space: 1286496 k
Free Disk Space After Install: 1162548 k
< Back
Next >
Cancel

5 If you want to accept the destination folder, click Next. If not, click Browse to locate another destination folder. Then click Next.

Result: The Ready to Install window appears.


CallPilot Administration Client (01.07.07.03) Installation Wizard
NORTEL NETWORKS
CallPilot™
Ready to Install
You are now ready to install the CallPilot Administration Client.
Press the Next button to begin the operation or the Back button to re-enter the installation/upgrade information.
< Back
Next >
Cancel

6 Click Next to continue the installation.

Result: The Nortel Reporter dialog box appears to warn you that the setup program will stop Reporter if it is not already shut down.

Nortel Reporter
Installation Wizard is going to stop Nortel Reporter.
Please make sure that you have saved all the necessary information in the Nortel Reporter applications.
Press OK to continue.
OK

7 Click OK to continue.

Result: A progress bar indicator displays the installation of the CallPilot files. Also, the table of contents on the left side of the install window begins to highlight each step of the process.

After all the components are installed, the Installation Completed window appears.

8 Click Finish to complete the installation.

9 If you chose earlier to install Acrobat Reader, the installation begins automatically at this point. Follow the Acrobat Reader installation procedures.

10 Restart your system.

Result: The CallPilot client software is now installed on the administrative PC. A Nortel Networks CallPilot Administration Client entry is added to your Start > Programs group.

What's next

Install any necessary client Performance Enhancement Packages (PEPs). See "Installing and uninstalling PEP packages" on page 33.

If PEPs are not required, proceed to Chapter 3, "Starting the client and adding a system."

Upgrading the client on the administrative PC

Introduction

To upgrade the CallPilot client software on the administrative PC, run the client setup program on the CallPilot Client CD or from a network drive.

Checklist for the upgrade of client software

Step	✔
Check that hardware requirements are met. See “Hardware requirements for the administrative PC” on page 14.	
Check that software requirements are met. See “Software requirements” on page 15.	
Obtain the user ID and password required to log on to the administrative PC. On a Windows NT administrative PC, you need an account that has local administrative privileges.	
Check the “Before you begin” section. See “Before you begin” on page 27.	
Start the client software upgrade. See “To upgrade the CallPilot client” on page 29.	
Install client PEPs if necessary. See “Installing and uninstalling PEP packages” on page 33.	

Note: You no longer require the Client Checking Tool that was used in the previous release of CallPilot. The software incompatibilities are now resolved in the installation software.

Before you begin

Log on

Ensure that you are logged on to an account with local administrative privileges (for example, Administrator).

Check that TCP/IP is installed

If TCP/IP is not installed, a warning message appears before the installation begins. Install TCP/IP on your operating system.

Check that Dial-Up Networking or RAS is installed

If you are using a modem, check that Dial-up Networking or RAS is installed.

- Dial-Up Networking (DUN)

  DUN is required if the administrative PC is running Windows 95/98 and is going to connect to the server over a modem connection.

  If Dial-Up Networking is not installed, a warning dialog box appears during the installation and asks if you want to quit the installation. Click No to bypass this prompt. Then install Dial-Up Networking later, if necessary.

  Dial-Up Networking might be installed as part of the Windows operating system installation. If Dial-Up Networking does not appear in the My Computer folder, then it is not installed. For information on how to install DUN, refer to the administrative PC's Windows operating system documentation.

- Remote Access Service (RAS)

  RAS is required if the administrative PC is running Windows NT and is going to connect to a remote server.

Meridian Application Tool Navigator

The CallPilot Administration Client Explorer replaces the Meridian Application Tool (MAT) Navigator as the access point to your CallPilot systems. If you are upgrading to this version of CallPilot, the upgrade process removes the copy of MAT that was supplied in your previous version of CallPilot. However, if you have a version of MAT installed that was not supplied by CallPilot, you can continue to use the MAT Navigator for switch administration.

How the upgrade affects your existing CallPilot systems

When you upgrade from a previous version of CallPilot, the upgrade removes your existing CallPilot systems from the MAT Navigator window and transfers them to the CallPilot Administration Client Explorer window.

The transfer changes the naming structure of your CallPilot systems to `systemname - site`.

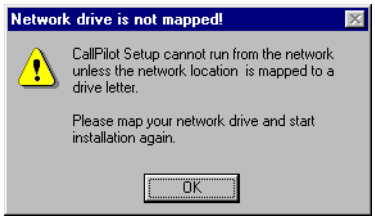
ODBC drivers

During the installation and upgrade programs, CallPilot might upgrade your ODBC drivers. Make sure that all programs that use ODBC drivers are shut down before you begin the installation or upgrade program.

If you install from a network CD-ROM drive

If you are installing from a remote CD-ROM or a network share, map the CallPilot Client CD to a drive letter on the administrative PC.

If the Client CD is not mapped to a drive letter, the following dialog box appears:


Network drive is not mapped!
CallPilot Setup cannot run from the network unless the network location is mapped to a drive letter.
Please map your network drive and start installation again.
OK

Shut down of Nortel Reporter

CallPilot shuts down Nortel Reporter before the installation begins. The installation software displays a message when this occurs.

Acrobat Reader 3.0 installation

After the CallPilot client installation is finished, CallPilot automatically starts the installation of Acrobat Reader 3.0 from the CallPilot Client CD. Follow the steps in the Acrobat Reader installation procedure to complete the installation.

Note: If you do not install Acrobat Reader, you cannot view the online reference guides.

Acrobat Reader search plug-in

Acrobat Reader 3.0 includes a search plug-in. The search plug-in enables you to search for keywords across the suite of online reference guides. If you install Acrobat Reader from the CallPilot Client CD, you get the search plug-in.

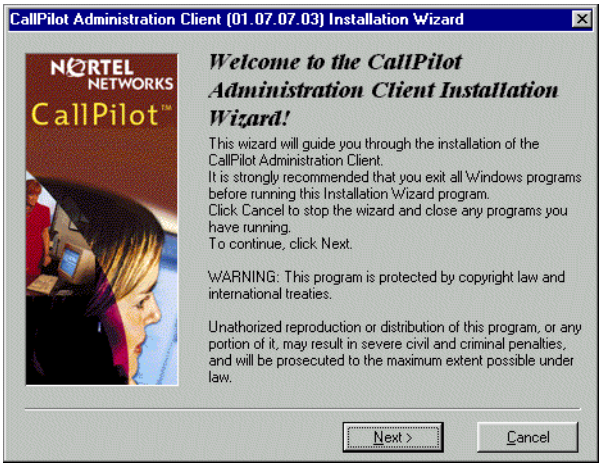
If you have Acrobat Reader 3.0 or higher already installed on the administrative PC and you do not replace it with the version on the CallPilot Client CD, make sure you have the search plug-in installed. Use the Find File tool on Windows Explorer to see if you have the search plug-in (Asrch32.api) installed.

To upgrade the CallPilot client

1. Exit all applications and close all windows.
2. Insert the CallPilot Client CD. If you are upgrading from a remote CD-ROM or a network share, map the CallPilot Client CD to a drive letter on the administrative PC.

   Note: If the system cannot read the CD-ROM, make sure the CD is properly seated in the drive. If you must remove the CD during the installation process, when you put the CD back in the drive, CallPilot continues the installation at the point it left off. However, Windows NT begins a second installation at the same time. Cancel the second installation process and continue with the first installation.

   Result: The setup program starts and the Welcome window appears.

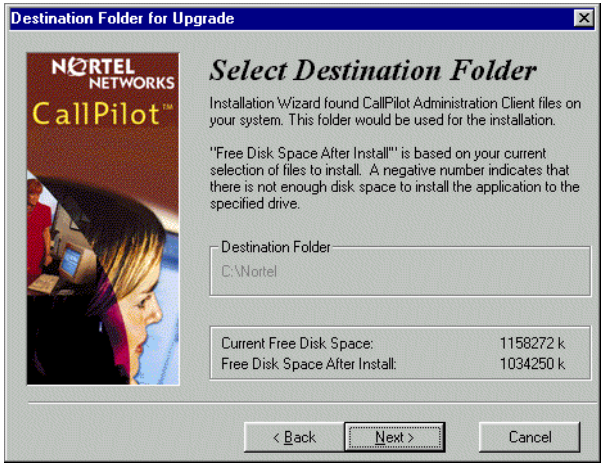

CallPilot Administration Client (01.07.07.03) Installation Wizard
NORTEL NETWORKS
CallPilot™
Welcome to the CallPilot Administration Client Installation Wizard!
This wizard will guide you through the installation of the CallPilot Administration Client.
It is strongly recommended that you exit all Windows programs before running this Installation Wizard program.
Click Cancel to stop the wizard and close any programs you have running.
To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
Unathorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Next >
Cancel

3 Click Next to continue the upgrade.

Result: The Main Menu appears.

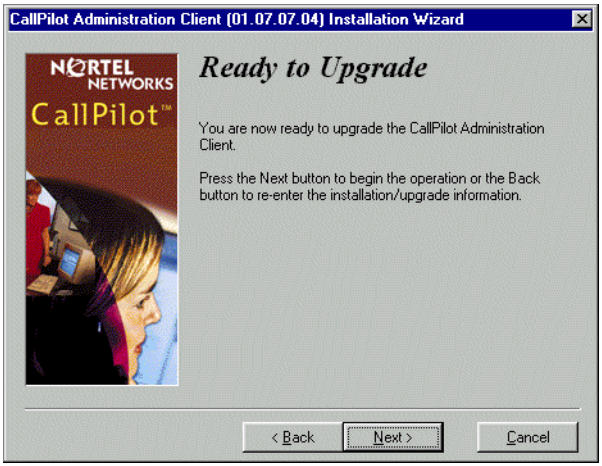
4 Click Upgrade to start the upgrade.

Result: The Select Destination Folder appears.


Destination Folder for Upgrade
NORTEL NETWORKS
CallPilot
Select Destination Folder
Installation Wizard found CallPilot Administration Client files on your system. This folder would be used for the installation.
"Free Disk Space After Install"' is based on your current selection of files to install. A negative number indicates that there is not enough disk space to install the application to the specified drive.
Destination Folder
C:\Nortel
Current Free Disk Space: 1158272 k
Free Disk Space After Install: 1034250 k
< Back
Next >
Cancel

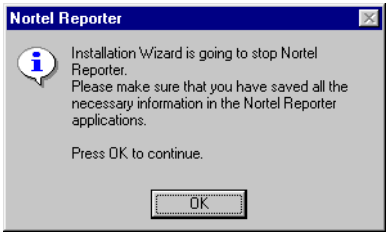
5 Read the information on the window and, if your disk space is sufficient, click Next.

Result: The Ready to Upgrade window appears.


CallPilot Administration Client (01.07.07.04) Installation Wizard
NORTEL NETWORKS
CallPilot™
Ready to Upgrade
You are now ready to upgrade the CallPilot Administration Client.
Press the Next button to begin the operation or the Back button to re-enter the installation/upgrade information.
< Back
Next >
Cancel

6 Click Next to continue the upgrade.

Result: The Nortel Reporter dialog box appears to warn you that the Installation Wizard will stop Reporter if it is not already shut down.


Nortel Reporter
Installation Wizard is going to stop Nortel Reporter.
Please make sure that you have saved all the necessary information in the Nortel Reporter applications.
Press OK to continue.
OK

7 Click OK to continue.

Result: A progress bar indicator displays the upgrade of the CallPilot files. Also, the table of contents on the left side of the upgrade window begins to highlight each step of the process.

After all the components are upgraded, the Installation Completed window appears.

8 Click Finish to complete the upgrade.

9 If you chose earlier to install Acrobat Reader, the installation begins automatically at this point. Follow the Acrobat Reader installation procedures.

10 Restart your system.

Result: The CallPilot client software is now upgraded on the administrative PC.

What's next

Install any necessary client Performance Enhancement Packages (PEPs). See "Installing and uninstalling PEP packages" on page 33.

If PEPs are not required, proceed to "Upgrading CallPilot server software" in Part 5 to upgrade the server.

Installing and uninstalling PEP packages

Introduction

Files called Performance Enhancement Packages (PEPs) are issued from time to time to enhance CallPilot functionality on the server and the client. This section contains the procedure you use to install and uninstall PEPs at any time on your CallPilot system.

If there are any PEPs for the CallPilot Client, you should install them at this point.

Note: The CallPilot Client on the administrative PC might not require any PEPs.

For an initial installation of CallPilot, the PEPs are provided on a CD. However, if you are using this procedure for a CallPilot system that is up and running, new PEPs are issued on the Nortel Networks CallPilot web site at http://www.nortelnetworks.com/prd/nic.

CAUTION

Risk of system problems

For specific PEP installation instructions, refer to the readme files in the PEP CD root directory and in the folder for each PEP package. In many cases, you must uninstall and install PEPs in a specific order. The readme files provide these instructions. When the readme files instruct you to uninstall or install PEPs, refer to the procedures in this section.

ATTENTION

If your CallPilot system is up and running, perform a system backup before you install a new PEP.

See *Monitoring and Security for the Administrator* for more information on performing a backup.

Identifying the PEPs

The PEP naming convention identifies the target platform of each PEP. The last character of the PEP name indicates C for client (administrative PC) PEPs.

Readme files

Readme files are provided in the following locations on the PEP CD:

- the Root directory on the PEP CD

  This readme file provides a general description of the PEP packages and general PEP install and uninstall instructions.

- each PEP package folder

  These readme files provide a list of all the PEPs in that package, as well as specific PEP install and uninstall instructions.

- each PEP folder

  These readme files describe the purpose of that PEP, and they might also provide some PEP installation instruction.

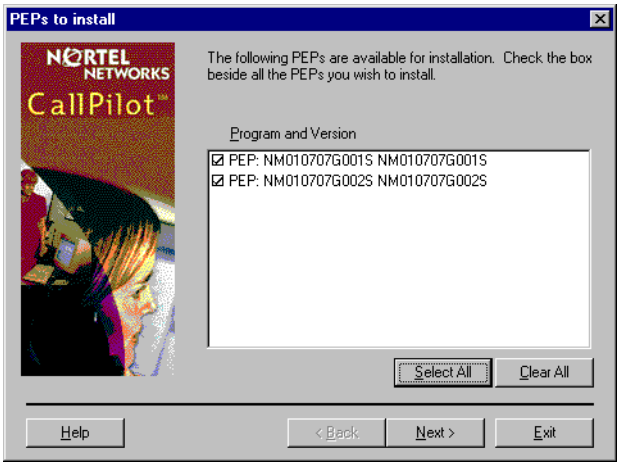
To install a PEP package

1. Read the readme files that are in the PEP CD root directory and in the folder for each PEP package for specific uninstall or installation instructions.
2. Log on to the client where you are going to begin PEP installation. Use a logon account that has administrative privileges (for example, sysadmin).
3. Insert the CallPilot PEP CD.
4. Open a folder that contains a PEP package.

5 Double-click runme.exe.

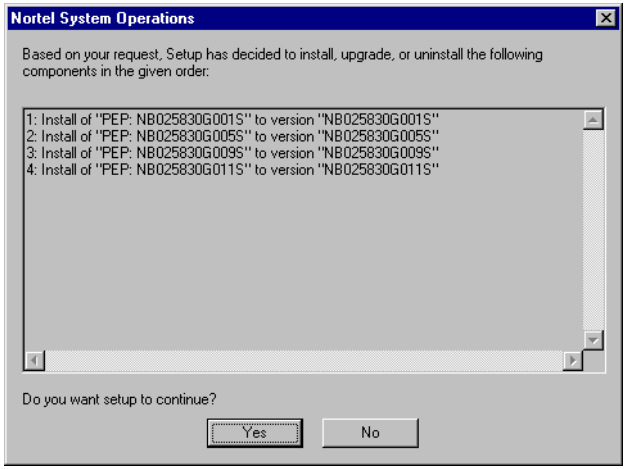
Result: Setup examines the system, and the PEPs to install window appears.

Note: The following example is for illustration purposes only and might not reflect what appears on your system.



6 Select the PEPs to install, and then click Next.

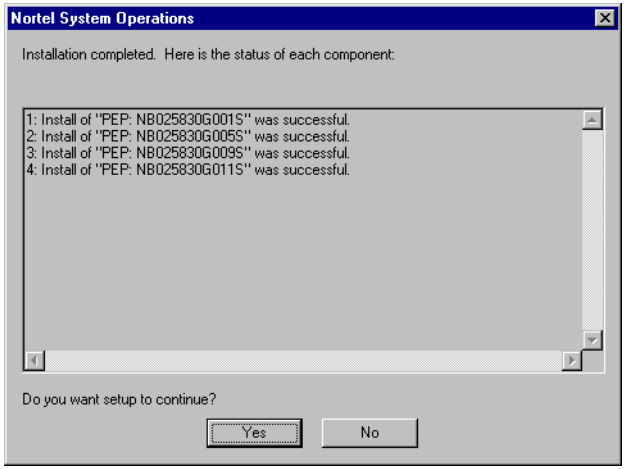
Result: The Nortel System Operations window appears and lists all components in the order in which they will be installed.


Nortel System Operations
Based on your request, Setup has decided to install, upgrade, or uninstall the following components in the given order:
1: Install of "PEP: NB025830G001S" to version "NB025830G001S"
2: Install of "PEP: NB025830G005S" to version "NB025830G005S"
3: Install of "PEP: NB025830G009S" to version "NB025830G009S"
4: Install of "PEP: NB025830G011S" to version "NB025830G011S"
Do you want setup to continue?
Yes
No

7 Click Yes to continue.

Result: The system automatically shuts down all services, and the PEPs are installed. A summary of the installation appears showing the success or failure of each PEP operation.

Note: CallPilot automatically removes obsolete PEPs when you install new PEPs.


Nortel System Operations
Installation completed. Here is the status of each component:
1: Install of "PEP: NB025830G001S" was successful.
2: Install of "PEP: NB025830G005S" was successful.
3: Install of "PEP: NB025830G009S" was successful.
4: Install of "PEP: NB025830G011S" was successful.
Do you want setup to continue?
Yes
No

8 Click Yes to complete the procedure.

Result: The program ends.

9 Repeat this procedure for other PEP packages. You do not need to restart after installing PEPs unless you are prompted to do so.

To uninstall a PEP package

CallPilot automatically removes obsolete PEPs when you install new PEPs. However, there can be times when you want to uninstall a PEP yourself.

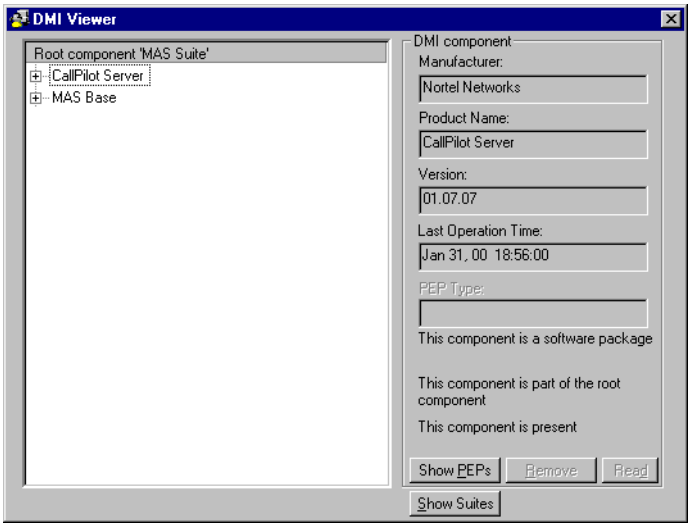
Use the DMI Viewer on the administrative PC to view or uninstall client PEPs. Access the DMI Viewers by clicking Start > Programs > Nortel Networks CallPilot Administration Client > CallPilot Administration Client Explorer > Utilities.

To uninstall PEPs on the client, follow these steps.

1 Log on to the client where you are going to begin the PEP uninstall. Use a logon account that has administrative privileges (for example, sysadmin).

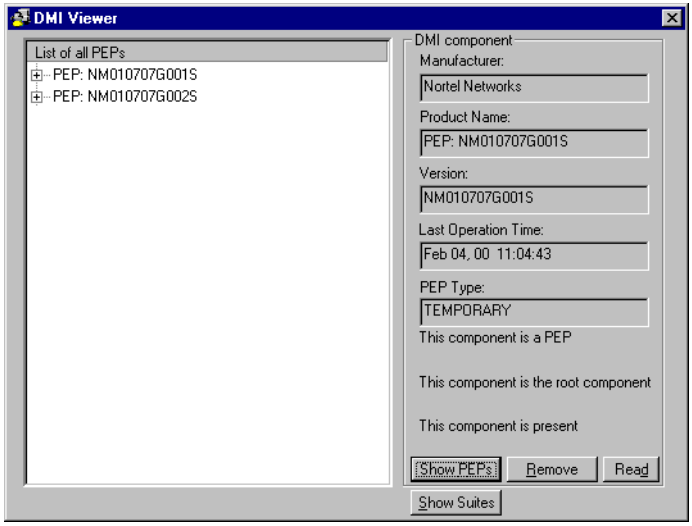
2 Open the DMI Viewer.

Result: The DMI Viewer window appears. The following example might not reflect exactly what appears on your system.



3 To view a list of all PEPs, click Show PEPs.

Result: A list of all PEPs appears.



4 Select the PEP you want to uninstall. You can select multiple PEPs to uninstall in one operation by using the Ctrl key. The prefix PEP identifies PEPs.

5 Click Remove.

Result: The system prompts you to confirm this choice.

6 Click Yes.

Result: The system automatically shuts down all services and uninstalls the selected PEPs. When the uninstall is finished, the system automatically restarts all services.

Note: After you uninstall a PEP, the PEP is still visible in the list of components until you restart DMI Viewer.

7 When you are finished, close the DMI Viewer window.

What's next

Proceed to Chapter 3, "Starting the client and adding a system."

If you are performing an upgrade procedure, refer to "Upgrading CallPilot server software" in Part 5 for instructions on how to upgrade your server.

Chapter 3

Starting the client and adding a system

In this section

Overview 40

About the CallPilot Administration Client Explorer 41

Starting the CallPilot Administration Client Explorer 43

Adding a system 44

Opening a system to access the administration tools 47

Grouping systems into a site 49

Overview

Introduction

This chapter explains how to

- open the CallPilot Administration Client Explorer

  The CallPilot Administration Client Explorer replaces the Meridian Application Tool (MAT) Navigator as the access point to your CallPilot system. For more information, see "Meridian Application Tool Navigator," on page 27.
- add a system to CallPilot

  For information on how upgrading CallPilot affects your existing systems, see "How the upgrade affects your existing CallPilot systems," on page 28.
- log on to a system so that you can access your administration tools on the CallPilot Administration Client
- group systems into a site

About the CallPilot Administration Client Explorer

Introduction

The CallPilot Administration Client Explorer is the access point for you to administer your CallPilot server and client.

You can view the CallPilot Administration Client Explorer by using

- Explorer
- Internet Explorer
- Active Desktop

Using the CallPilot Administration Client Explorer

Use the CallPilot Administration Client Explorer to

- access utilities, such as the DMI Viewer and the PC Events browser
- add a system
- select a system and log on to the CallPilot Administration Client system window where you perform administrative tasks
- access the online Nortel Networks technical publications
- start the CallPilot Tour where you learn the basics of working with the CallPilot system
- access Communicator
- get help on the CallPilot Administration Client

Distribution of configured systems

CallPilot Administration Clients can share systems. Systems can be

- shared on a network drive
- copied to the local hard drive of another CallPilot Administration Client
- e-mailed to a person

You can copy system icons like standard files.

Starting the CallPilot Administration Client Explorer

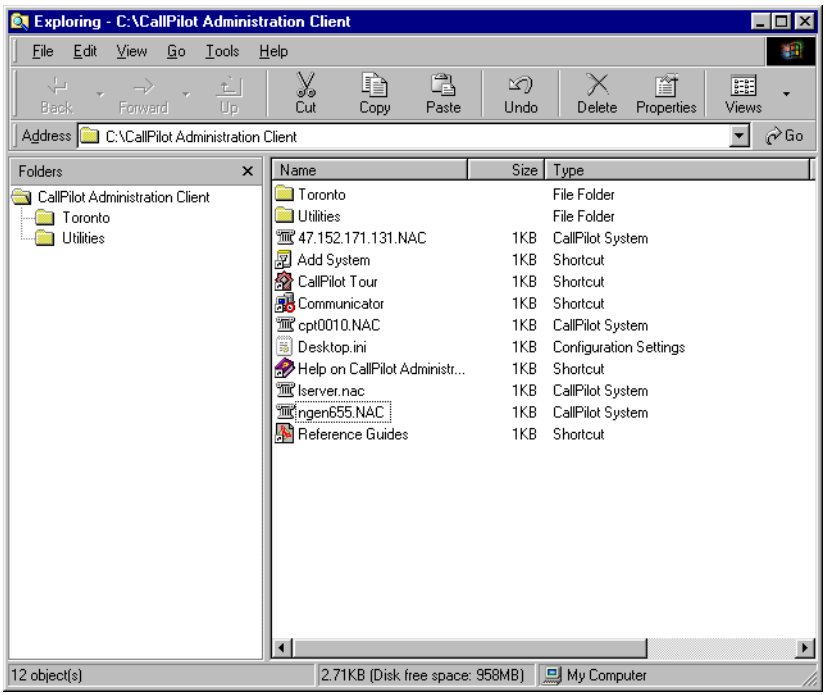
Introduction

Use the CallPilot Administration Client Explorer to access your CallPilot system.

To start the CallPilot Administration Client Explorer

1 Click Start > Programs and select Nortel Networks CallPilot Administration Client.

Result: The CallPilot Administration Client Explorer window appears.



Adding a system

Introduction

Use the Add CallPilot System wizard to add a system to the site.

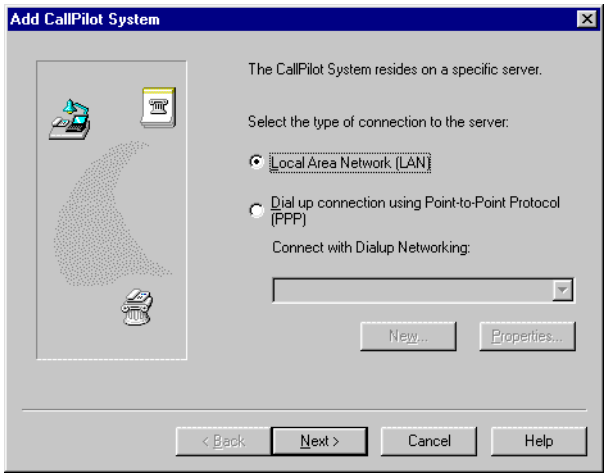
To add a system to the site

1 Click Start > Programs and select Nortel Networks CallPilot Administration Client.

Result: The CallPilot Administration Client Explorer window appears.

2 Double-click Add System.

Result: The first screen of the Add CallPilot System wizard appears.



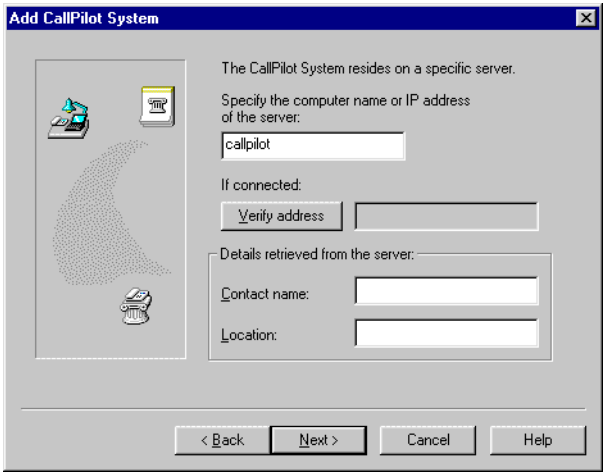
3 A system resides on a specific server. Select the type of connection to the server (Local Area Network or Dial up connection).

If the administrative PC is on the same local network as the server, choose Local Area Network; otherwise, choose Dial up connection.

Note: For instructions on configuring a dial-up connection, refer to the Windows operating system documentation. When the dial-up connection is configured, continue with the next step in this procedure.

4 Click Next.

Result: The second screen of the Add CallPilot System wizard appears.



5 Enter the computer name or the CLAN IP address of the server that you want to add to CallPilot.

Note: If, at this point, you are not connected to the server, CallPilot tries to locate the server when you connect at a future time.

6 Click Verify address to verify that the administrative PC can find the server.

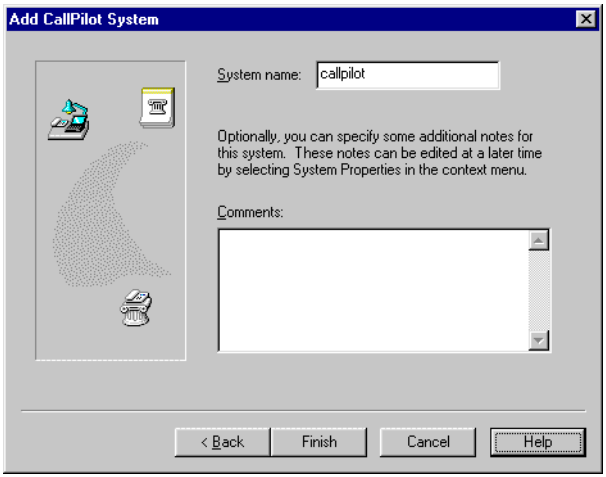
If you use the computer name to identify the server, then this step inserts the CLAN IP address for the server. If you use the IP address to identify the server, then this step inserts the computer name. Also, if the server has a Contact name and Location defined, this information is inserted into the Add CallPilot System wizard.

Note:

- If you are not connected to the server or the server is offline, when you click Verify address, you get an error message. However, CallPilot looks for the server when you try to connect at a future time.
- If you use an incorrect computer name or IP address, when you click Verify address, you get an error message. Check to make sure that your computer name or IP address is correct. If you use an incorrect computer name or IP address, the system searches the network and some time can elapse before the error message appears and you can continue.

7 Click Next.

Result: The last screen of the Add CallPilot System wizard appears.


Add CallPilot System
System name:
callpilot
Optionally, you can specify some additional notes for this system. These notes can be edited at a later time by selecting System Properties in the context menu.
Comments:
< Back
Finish
Cancel
Help

8 If necessary, change the name of the system. The system name must follow standard Windows operating system file naming rules (for example, no symbols).

In Comments, enter any notes or comments about the system that you require.

9 Click Finish.

Result: The system name appears in the right pane of the CallPilot Administration Client Explorer.

Opening a system to access the administration tools

Introduction

Now that you have added a system to your CallPilot Administration Client Explorer, you can open the system to access the administration tools.

To open a system

1. On the CallPilot Administration Client Explorer, double-click the system name.

   Result: The CallPilot Administration Client system logon window appears.

2. In User ID, type **sysadmin**.

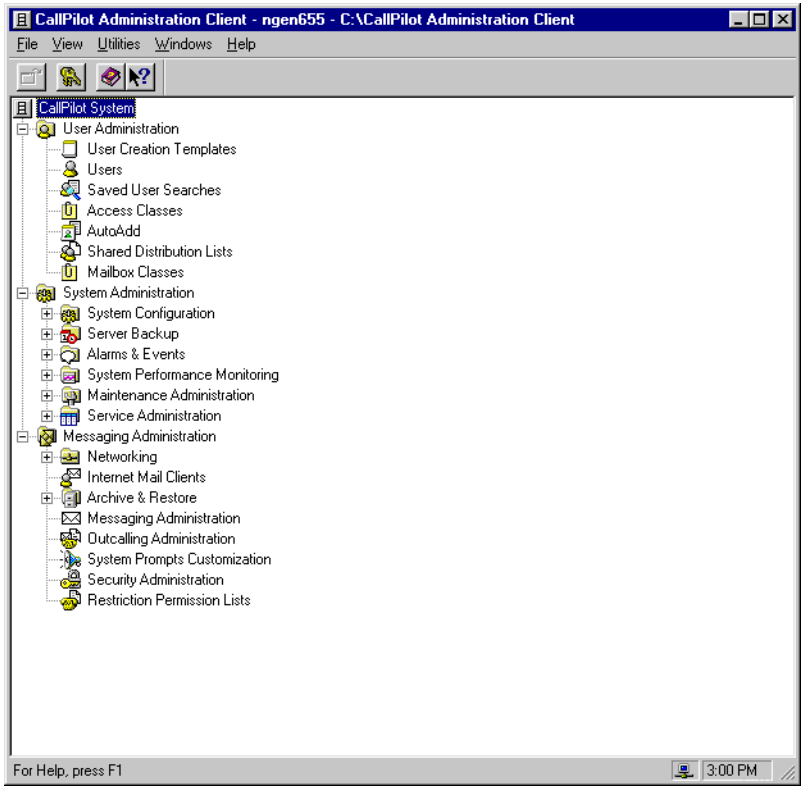
3. In Password, type **nortel**.

   Note: The system prompts you to change your password after the initial logon.

   Note: If you upgraded your CallPilot system to the new version of CallPilot, your system logon password remains the same as the one you used in your previous version of CallPilot.

4 Click OK.

Result: The CallPilot Administration Client window appears.



Grouping systems into a site

Introduction

You can group systems logically by placing them into folders with meaningful names.

The site folders appear on the left pane of the CallPilot Administration Client Explorer window.

To group systems into a site

1. Create a subfolder in the CallPilot Administration Client Explorer folder.
2. Name the subfolder with the site name.
3. Click and drag the systems into the new site folder.

What's next

After you connect to a system and before you begin the administrative setup, you can perform a test to verify that the call channel and multimedia channels are functioning. Refer to Chapter 4, "Testing your channels," to test the channels.

Chapter 4

Testing your channels

In this chapter

Overview 52

Testing call channels and multimedia channels 53

Overview

Introduction

This chapter contains a procedure for verifying that all call channels and multimedia channels are functioning. Perform this test after CallPilot is installed and before the administrator begins the administrative setup of CallPilot mailboxes and users.

The call channels test verifies that call traffic arrives at the CallPilot server from the switch. The multimedia channels test verifies that the multimedia channels in CallPilot are processing calls.

Before you begin

- Ensure that your switch is properly configured for your system and that the CallPilot software is installed and configured on the server and the administrative PC.
- To perform the test, you need information dependent on the switch type from the following table:

Switch	Required information
Meridian 1	ACD DN
MSL-100/DMS-100	UCD Group DNs (Primary DNs)
Lucent, Mitel, or Rolm	Hunt group DNs (Primary DNs)

- Have a pencil and paper ready to record the channels that pass the test.

Testing call channels and multimedia channels

Introduction

Use this test to verify that all call channels and multimedia channels are functioning.

To test the call channels and multimedia channels

1 Log on to the CallPilot Administration Client Explorer on the administrative PC and connect to a system.

Result: The CallPilot Administration Client appears.

2 From the CallPilot Administration Client window, double-click System Administration > Maintenance Administration > Channel Monitor.

Result: The Channel Monitor appears.

Note: If you need additional instructions for the Channel Monitor, refer to the online Help or the *Administrator's Guide*.

3 Select whole system and start all channels.

4 Verify that all channels are in Idle state, and leave the Channel Monitor window open so that you can observe when channels change to Active state.

5 Double-click Service Administration > Service Directory Number.

Result: The Service Directory Number window appears.

Testing call channels and voice channels

6 Select File > New.

Result: The New Inbound Service Directory Number Properties property sheet appears.

Note: If you need additional instructions for the SDN table, refer to the online Help or the *Administrator's Guide*.

7 In the Service DN box, type one of the following entries depending on your switch type:

Switch	Service DN entry
Meridian 1	ACD DN
MSL-100/DMS-100	Primary DN for the Voice UCD group
Lucent, Mitel, or Rolm	Primary hunt group DN for the Voice hunt group

8 In the Application Name box, select Voice Messaging.

9 In the Media Type box, select Voice.

10 Click Save.

11 From the CallPilot Administration Client, double-click Maintenance Administration > Multimedia Monitor.

Result: The Multimedia Monitor appears.

Note: If you need additional instructions for the Multimedia Monitor, refer to the online Help or the *Administrator's Guide*.

12 Start all voice channels, if voice channels are present.

Note: Nortel Networks recommends that you test a maximum of 24 voice channels at one time. For example, if you have a 96-channel system, start only 24 voice channels. When those 24 voice channels are tested, then stop those voice channels and start another set of voice channels.

13 Stop all fax and speech recognition channels, if these channels are present.

14 Verify that all voice channels are in Idle state, and leave the Multimedia Monitor window open so that you can observe when channels change to Active state.

15 Use a telephone to dial the service DN you entered in the SDN table for Voice Messaging.

16 Verify that CallPilot answers the call and that the CallPilot greeting plays.

17 Record which call channel (on the Channel Monitor window) and which voice channel (on the Multimedia Monitor window) change to Active state.

18 Hang up the phone.

19 Repeat steps 15 to 18 until the switch has cycled through all voice channels.

Note: If the calls are not cycling through all voice channels, then stop some of the voice channels that have already been tested. When you stop the channels, there might be a short delay due to the one-minute standby mode.

20 Stop the call channels in the Channel Monitor window that have been tested. This should be the same number as the number of voice channels tested. (If you tested four voice channels, then stop four of the tested call channels.) Continue this procedure to ensure that the remaining untested call channels are tested.

Testing call channels and fax channels

21 In the Service Directory Number window, select the CallPilot service DN that you already created for Voice Messaging.

22 Select File > Properties.

Result: The Edit Service Directory Number Properties property sheet appears.

23 In the Service DN box, type one of the following entries depending on the switch type:

Note: For the Meridian 1 switch, the Service DN entry is always the ACD DN.

Switch	Service DN entry
Meridian 1	ACD DN
MSL-100/DMS-100	Primary DN for the Fax UCD group
Lucent, Mitel, or Rolm	Primary hunt group DN for the Fax hunt group

24 In the Media Type box, select Fax.

Note: You can leave the Application Name as Voice Messaging.

25 Click Save.

26 From the CallPilot Administration Client, double-click Maintenance Administration > Multimedia Monitor.

27 Start all fax channels.

Note: Nortel Networks recommends that you test a maximum of 24 fax channels at one time. For example, if you have a 96-channel system, start only 24 fax channels. When those 24 fax channels are tested, stop those fax channels and start another set of fax channels.

28 Stop all voice and speech recognition channels, if these channels are present.

29 Verify that all fax channels are in Idle state, and leave the Multimedia Monitor window open so that you can observe when channels change to Active state.

30 Use a telephone to dial the service DN you entered in the SDN table for Voice Messaging.

31 Verify that CallPilot answers the call and that the CallPilot greeting plays.

32 Record which call channel (on the Channel Monitor window) and which fax channel (on the Multimedia Monitor window) change to Active state.

33 Hang up the phone.

34 Repeat steps 30 to 33 until the switch has cycled through all fax channels.

Note: If the calls are not cycling through all fax channels, then stop some of the fax channels that have already been tested.

35 Stop the call channels in the Channel Monitor window that have been tested. This should be the same number as the number of fax channels tested (if you tested four fax channels, then stop four of the tested call channels). Continue this procedure to ensure that the remaining untested call channels are tested.

Testing call channels and speech recognition channels

36 In the Service Directory Number window, select the CallPilot service DN that you already created for Voice Messaging.

37 Select File > Properties.

Result: The Edit Service Directory Number Properties property sheet appears.

38 In the Service DN box, type one of the following entries depending on the switch type:

Note: For the Meridian 1 switch, the Service DN entry is always the ACD DN.

Switch	Service DN entry
Meridian 1	ACD DN
MSL-100/DMS-100	Primary DN for the Speech Recognition UCD group
Lucent, Mitel, or Rolm	Primary hunt group DN for the Speech Recognition hunt group

39 In the Media Type box, select Speech Recognition.

Note: You can leave the Application Name as Voice Messaging.

40 Click Save.

41 From the CallPilot Administration Client window, double-click Maintenance Administration > Multimedia Monitor.

Result: The Multimedia Monitor appears.

42 Start all speech recognition channels.

Note: Nortel Networks recommends that you test a maximum of 24 speech recognition channels at one time. For example, if you have a 96-channel system, start only 24 speech recognition channels. When those 24 speech recognition channels are tested, stop those speech recognition channels and start another set of speech recognition channels.

43 Stop all fax and voice channels, if these channels are present.

44 Verify that all speech recognition channels are in Idle state, and leave the Multimedia Monitor window open so that you can observe when channels change to Active state.

45 Use a telephone to dial the service DN you entered in the SDN table for Voice Messaging.

46 Verify that CallPilot answers the call and that the CallPilot greeting plays.

47 Record which call channel (on the Channel Monitor window) and which speech recognition channel (on the Multimedia Monitor window) change to Active state.

48 Hang up the phone.

49 Repeat steps 45 to 48 until the switch has cycled through all speech recognition channels.

Note: If the calls are not cycling through all speech recognition channels, then stop some of the speech recognition channels that have already been tested.

50 Stop the call channels in the Channel Monitor window that have been tested. This should be the same number as the number of speech recognition channels tested. (If you tested four speech recognition channels, then stop four of the tested call channels.) Continue this procedure to ensure that the remaining untested call channels are tested.

Restoring the SDN Table and putting all channels back in service

51 In the Service Directory Number window, select the CallPilot service DN that you already created for Voice Messaging.

52 Select File > Delete.

Result: The service DN is deleted.

53 In the Channel Monitor window, select the whole system and start all channels.

54 Verify that all channels are in Idle state.

55 In the Multimedia Monitor window, select the whole system and start all channels.

56 Verify that all channels are in Idle state.

To test that you can log on to a mailbox and compose a message

1 Log on to CallPilot Administration Client Explorer and connect to a server.

2 From the CallPilot Administration Client window, double-click System Administration > Service Administration > Service Directory Number.

Result: The Service Directory Number window appears.

3 Add a Service Directory Number for voice messaging services. This is usually the first CDN.

The media type should be voice.

Note: If you are unfamiliar with adding Service Directory Numbers to the SDN table, refer to the *Administrator's Guide* for more information.

4 Click OK to finish the setup.

5 Add a mailbox user.

Note: If you are unfamiliar with adding mailbox users, refer to the *Administrator's Guide* for more information.

6 Use the telephone to dial the service DN you entered in the SDN table.

7 Log on to the mailbox and change the password.

8 Compose a message to yourself and then hang up the telephone.

9 Use the telephone to log on to the mailbox. Check that the message is there and that the Message Waiting Indicator (MWI) is on.

What's next

After the CallPilot system is up and running, the administrator can start to set up mailbox users. Refer to Chapter 5, "Setting up CallPilot after the installation," to determine the tasks you must complete after installation.

Chapter 5

Setting up CallPilot after the installation

In this chapter

After you install CallPilot 62

After you install CallPilot

Introduction

After you install the CallPilot client on the administrative PC and test that the CallPilot system is operable, the administrator can begin using the software to set up mailbox users and perform other tasks.

This section provides an overview of the setup and configuration of CallPilot for use by mailbox users. It includes cross-references to other NTPs where the procedures are fully documented.

Setting up administration

After the installation of the CallPilot software, the system administrator must perform a number of tasks so that the mailbox users can access their mailboxes:

- Configure the Service Directory Number (SDN) table.
- Define access classes.
- Define restriction/permission lists.
- Define messaging administration properties.
- Define mailbox classes.
- Create mailboxes using templates.
- Set up a mailbox database.

For information on performing these tasks, refer to the *Administrator's Guide.*

Configuring a network

If networking is purchased and installed, the network administrator must perform the following activities:

- Configure the local and remote servers.
- Define connection protocol specifics for the installed networking protocols.

For information on networking, refer to the *Networking Guide* for your network type.

Building Application Builder applications

The administrator can create voice and fax applications that callers can access by dialing telephone numbers.

For more information on creating applications, refer to the *Application Builder Guide.*

Installing and configuring Desktop Messaging clients

Desktop Messaging gives mailbox users access to their CallPilot messages from their PC. If Desktop Messaging is purchased, it must be installed and configured on a mailbox user's PC.

For more information on installing the software, refer to the *Desktop Messaging Software Installation and Maintenance Guide.*

Chapter 6

Uninstalling CallPilot client software

In this chapter

Overview 66

Uninstalling the client software 67

Overview

Introduction

This chapter contains the procedure for uninstalling the CallPilot client software. The uninstall process completely removes all CallPilot client software from the hard disk drive.

Uninstalling the client software

Introduction

Uninstall the CallPilot client to remove the software completely from the hard disk drive.

Checklist for uninstalling CallPilot client software

Steps	✔
Obtain the user ID and password required to log on to the client. On a Windows NT client PC, you need an account that has local administrative privileges.	
Exit from Reporter Communicator. See "Uninstalling the client software" on page 67.	
Check the "Before you begin" section.	
Uninstall CallPilot client software. See "To uninstall CallPilot from the administrative PC" on page 68.	

Before you begin

Uninstalling from a Windows NT client

Ensure that you are still logged on to an account with local administrative privileges (for example, Administrator).

Three uninstall procedures

There are three procedures you can use to uninstall the CallPilot client:

- the Uninstall CallPilot Administration Client program in the Utilities folder on the CallPilot Administration Client Explorer. (This procedure is fully documented in the next section.)

- the Uninstall function on the Main Menu of the setup program on the CallPilot Client CD-ROM
- the Add/Remove Programs tool in the operating system Control Panel

To uninstall CallPilot from the administrative PC

1 On the CallPilot Administration Client Explorer window, double-click Utilities.

Result: The Utilities tree appears.

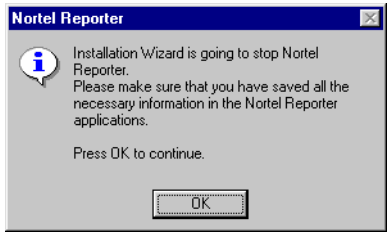
2 Double-click Uninstall CallPilot Administration Client.

Result: The Welcome window appears.

Welcome Dialog Box
NORTEL NETWORKS
CallPilot™
Welcome!
This program uninstalls CallPilot Administration Client.
Press the Next button to continue. You can press the Cancel button now if you do not want to uninstall CallPilot Administration Client at this time.
Next >
Cancel

3 Click Next to continue the uninstall process.

Result: A Nortel Reporter message indicates that setup is going to stop Reporter.


Nortel Reporter
Installation Wizard is going to stop Nortel Reporter.
Please make sure that you have saved all the necessary information in the Nortel Reporter applications.
Press OK to continue.
OK

4 Click Next.

Result: The uninstall proceeds until the Uninstall Completed window appears.

5 Click Finish.

6 Restart your system.

Result: The CallPilot Client software is removed from the administrative PC, and the Nortel Networks CallPilot Administration Client entry is removed from the Start > Programs group.

Chapter 7

Reinstalling CallPilot client software

In this chapter

Overview 72

Reinstalling the client software 73

Overview

Introduction

This chapter describes how to reinstall the CallPilot client software if a previous client installation failed or was interrupted.

For a reinstall of the complete CallPilot system, see Part 5 in this binder.

Reinstalling the client software

Introduction

Use this procedure if a previous installation failed or was interrupted and you want to have a complete installation of CallPilot client software on your system.

Reinstallation options

When you reinstall the client software, you are offered the following options during the program:

- Install the CallPilot client software without changing the database values. Choose this option if you want all of your Reporter data and PC Event logs to remain in the database.
- Install the CallPilot client software and return the database to an initial state. Choose this option if you want all of your Reporter data and PC Event logs to be permanently removed from the database.

To reinstall the software

1. Exit all applications and close all windows.
2. Insert the CallPilot Client CD. If you are reinstalling from a remote CD-ROM or a network share, then map the CallPilot Client CD to a drive letter on the client PC.

   Note: If the system cannot read the CD-ROM, make sure the CD is properly seated in the drive. If you must remove the CD during the reinstall process, when you put the CD back in the drive, CallPilot continues the reinstall at the point it left off. However, Windows NT begins a second

installation at the same time. Cancel the second installation process and continue with the first reinstall.

Result: The setup program starts and the Welcome window appears.

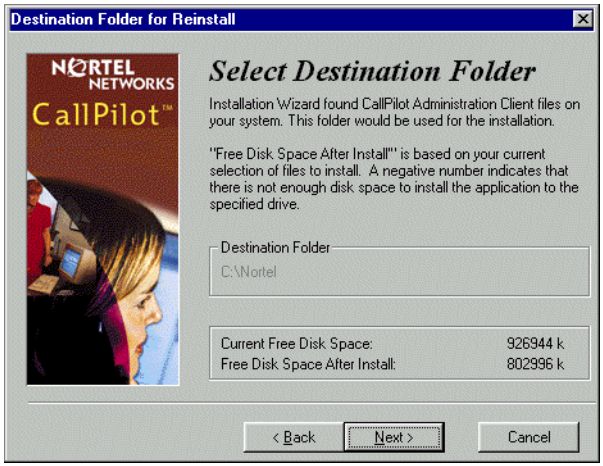
CallPilot Administration Client (01.07.07.03) Installation Wizard
NORTEL NETWORKS
CallPilot™
Welcome to the CallPilot Administration Client Installation Wizard!
This wizard will guide you through the installation of the CallPilot Administration Client.
It is strongly recommended that you exit all Windows programs before running this Installation Wizard program.
Click Cancel to stop the wizard and close any programs you have running.
To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
Unathorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.
Next >
Cancel

3 Click Next to continue the reinstallation.

Result: The Main Menu appears.

4 Click Reinstall to start the reinstallation.

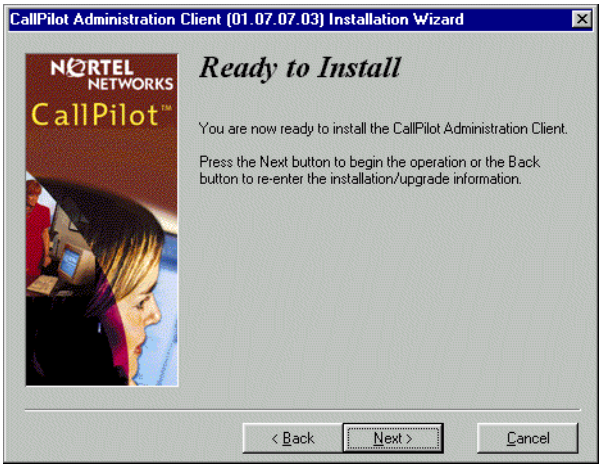
Result: The Select Destination Folder window appears.


Destination Folder for Reinstall
NORTEL NETWORKS
CallPilot™
Select Destination Folder
Installation Wizard found CallPilot Administration Client files on your system. This folder would be used for the installation.
"Free Disk Space After Install"' is based on your current selection of files to install. A negative number indicates that there is not enough disk space to install the application to the specified drive.
Destination Folder
C:\Nortel
Current Free Disk Space: 926944 k
Free Disk Space After Install: 802996 k
< Back
Next >
Cancel

5 The Select Destination Folder window indicates that the CallPilot client will be reinstalled into the existing CallPilot folder on your system.

Read the instructions on the window about the free disk space on your hard disk drive. If the free disk space size is acceptable, click Next.

Result: The Ready to Install window appears.


CallPilot Administration Client (01.07.07.03) Installation Wizard
NORTEL NETWORKS
CallPilot™
Ready to Install
You are now ready to install the CallPilot Administration Client.
Press the Next button to begin the operation or the Back button to re-enter the installation/upgrade information.
< Back
Next >
Cancel

6 Click Next.

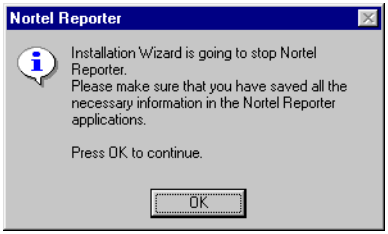
Result: The Confirm Reinstallation window appears.

Confirm Reinstallation
Installation Wizard has detected the previous installation of CallPilot Administration Client. Do you want to retain your user-related data in the database?
Yes
No

7 If you want to reinstall the client software and keep the user-related information in your database untouched, click Yes.

If you want to reinstall the client software and return the database to an initial state by removing all the user-related information, click No.

Result: The Nortel Reporter dialog box appears to warn you that the setup program will shut down Reporter if it is not already shut down.


Nortel Reporter
Installation Wizard is going to stop Nortel Reporter.
Please make sure that you have saved all the necessary information in the Nortel Reporter applications.
Press OK to continue.
OK

8 Click OK to continue.

Result: A progress bar indicator appears to show the reinstallation of the CallPilot files. After all the files reinstall, the Reinstallation Completed window appears.

9 Click Finish to complete the reinstall. CallPilot might display a message asking you to restart your system. If so, restart your system.

Result: The CallPilot client software is now reinstalled on the administrative PC. A Nortel Networks CallPilot Administration Client entry is added to your Start > Programs group.

Index

A

Acrobat Reader
  installing 21, 28
adding a system to the administrative PC 44
administrative PC
  hardware requirements 14
  installation log file 15
  installing and uninstalling PEPs 33
  installing CallPilot software 20, 22
  software requirements 15
  time required to install client 15
  upgrading CallPilot software 27, 29

C

CallPilot Administration Client
  testing call and multimedia channels 51
CallPilot Administration Client Explorer
  adding a system 44
  grouping systems into a site 49
  viewing the window 41
  working with 41
client checking tool
  not required 19, 26

D

Desktop Messaging 63
dial-up networking 20, 27

I

installing, the client
  Acrobat Reader 21, 28
  before you begin 20
  dial-up networking 20, 27
  ODBC drivers 20, 28
  procedure 22
  selecting the destination folder 23, 30
  shutting down Reporter 21, 28
IP address 45

M

Meridian Application Tool Navigator 27

O

ODBC drivers
  upgrading 12, 20, 28

P

Performance enhancement packages (PEPs)
  identifying types 33
  installation procedure 34
  overview 33
  readme files 34
  removing obsolete 36
  shutting down services 36
  uninstall procedure 36
  using the DMI viewer 36

R

reinstalling, the client
  changing the database 76
  overview 72
  procedure 73
  software only 76
Reporter
  shutting down before installation 21, 28
  shutting down before reinstallation 76

S

system
adding to CallPilot 44
computer name 45
grouping systems into a site 49
IP address 45
network connection 44
on the CallPilot Administration Client
Explorer tree 46
system name 46
upgrading 28

T

TCP/IP 20, 27
testing call and multimedia channels 51

U

uninstalling the client
overview 67
procedure 68
upgrading the client
before you begin 27
ODBC drivers 20, 28
overview 26
procedure 29

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CallPilot

Installation and Configuration

Part 4: Client Software Installation Guide

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